Short Form Return of Organization Exempt From Income Tax

Form **990-EZ**

Department of the Treasury
Internal Revenue Service

Under section 501(c), 527, or 4947(a)(1) of the Internal Revenue Code (except black lung benefit trust or private foundation)

▶ Sponsoring organizations of donor advised funds and controlling organizations as defined in section 512(b)(13) must file Form 990 All other organizations with gross receipts less than $500,000 and total assets less than $1,250,000 at the end of the year may use this form

▶ *The organization may have to use a copy of this return to satisfy state reporting requirements*

OMB No 1545-1150

2009

Open to Public Inspection

A For the 2009 calendar year, or tax year beginning and ending

B Check if applicable: ☐ Address change ☐ Name change ☐ Initial return ☐ Termin-ated ☐ Amended return ☐ Application pending

Please use IRS label or print or type See Specific instruc-tions

C Name of organization: E.F. SCHUMACHER SOCIETY, INC.

Number and street (or P O box, if mail is not delivered to street address): 140 JUG END ROAD

Room/suite

City or town, state or country, and ZIP + 4: GREAT BARRINGTON, MA 01230

D Employer identification number: 03-0278626

E Telephone number: 413-528-1737

F Group Exemption Number ▶

• Section 501(c)(3) organizations and 4947(a)(1) nonexempt charitable trusts must attach a completed Schedule A (Form 990 or 990-EZ).

G Accounting method. ☐ Cash ☒ Accrual Other (specify) ▶

I Website: ▶ WWW.SCHUMACHERSOCIETY.ORG/

H Check ▶ ☐ if the organization is not required to attach Schedule B (Form 990, 990-EZ, or 990-PF)

J Tax-exempt status (check only one) — ☒ 501(c)(3) ◀ (insert no) ☐ 4947(a)(1) or ☐ 527

K Check ▶ ☐ if the organization is not a section 509(a)(3) supporting organization and its gross receipts are normally not more than $25,000 A Form 990-EZ or Form 990 return is not required, but if the organization chooses to file a return, be sure to file a complete return

L Add lines 5b, 6b, and 7b, to line 9 to determine gross receipts, If $500,000 or more, file Form 990 instead of Form 990-EZ ▶ $ 279,487.

SCANNED APR 08 2010

RECEIVED
MAR 23 2010
OGDEN, UT
IRS-OSC

Part I Revenue, Expenses, and Changes in Net Assets or Fund Balances (See the instructions for Part I)

Revenue	1	Contributions, gifts, grants, and similar amounts received		1	254,530.
	2	Program service revenue including government fees and contracts		2	19,885.
	3	Membership dues and assessments		3	0.
	4	Investment income		4	
	5a	Gross amount from sale of assets other than inventory STMT 3	5a 1,569.		
	b	Less cost or other basis and sales expenses STMT 4	5b 2,362.		
	c	Gain or (loss) from sale of assets other than inventory (Subtract line 5b from line 5a)		5c	-793.
	6	Special events and activities (complete applicable parts of Schedule G) If any amount is from gaming, check here ▶ ☐			
	a	Gross revenue (not including $ of contributions reported on line 1)	6a		
	b	Less direct expenses other than fundraising expenses	6b		
	c	Net income or (loss) from special events and activities (Subtract line 6b from line 6a)		6c	
	7a	Gross sales of inventory, less returns and allowances STMT 6	7a 3,003.		
	b	Less cost of goods sold	7b 6,714.		
	c	Gross profit or (loss) from sales of inventory (Subtract line 7b from line 7a)		7c	-3,711.
	8	Other revenue (describe ▶ RENTAL INCOME)		8	500.
	9	**Total revenue.** Add lines 1, 2, 3, 4, 5c, 6c, 7c, and 8 ▶		9	270,411.
Expenses	10	Grants and similar amounts paid (attach schedule)		10	
	11	Benefits paid to or for members		11	
	12	Salaries, other compensation, and employee benefits		12	94,675.
	13	Professional fees and other payments to independent contractors		13	22,981.
	14	Occupancy, rent, utilities, and maintenance SEE STATEMENT 5		14	70,094.
	15	Printing, publications, postage, and shipping		15	10,110.
	16	Other expenses (describe ▶ SEE STATEMENT 1)		16	51,601.
	17	**Total expenses.** Add lines 10 through 16 ▶		17	249,461.
Net Assets	18	Excess or (deficit) for the year (Subtract line 17 from line 9)		18	20,950.
	19	Net assets or fund balances at beginning of year (from line 27, column (A)) (must agree with end-of-year figure reported on prior year's return)		19	275,505.
	20	Other changes in net assets or fund balances (attach explanation)		20	
	21	Net assets or fund balances at end of year Combine lines 18 through 20 ▶		21	296,455.

Part II Balance Sheets. If Total assets on line 25, column (B) are $1,250,000 or more, file Form 990 instead of Form 990-EZ

(See the instructions for Part II)

		(A) Beginning of year		(B) End of year
22	Cash, savings, and investments	3,394.	22	55,791.
23	Land and buildings	472,042.	23	499,317.
24	Other assets (describe ▶ SEE STATEMENT 2)	51,015.	24	44,326.
25	**Total assets**	526,451.	25	599,434.
26	**Total liabilities** (describe ▶)	250,946.	26	302,979.
27	**Net assets or fund balances** (line 27 of column (B) must agree with line 21)	275,505.	27	296,455.

Part III Statement of Program Service Accomplishments (See the instructions for Part III.)

What is the organization's primary exempt purpose? SEE STATEMENT 8

Describe what was achieved in carrying out the organization's exempt purposes. In a clear and concise manner, describe the services provided, the number of persons benefited, and other relevant information for each program title.

Expenses (Required for section 501(c)(3) and 501(c)(4) organizations and section 4947(a)(1) trusts, optional for others.)

28 SEE ATTACHED STATEMENT OF PROGRAM SERVICE ACCOMPLISHMENTS

(Grants $) If this amount includes foreign grants, check here ▶ ☐ 28a 186,562.

29

(Grants $) If this amount includes foreign grants, check here ▶ ☐ 29a

30

(Grants $) If this amount includes foreign grants, check here ▶ ☐ 30a

31 Other program services (attach schedule)

(Grants $) If this amount includes foreign grants, check here ▶ ☐ 31a

32 **Total program service expenses** (add lines 28a through 31a) ▶ 32 186,562.

Part IV List of Officers, Directors, Trustees, and Key Employees. List each one even if not compensated (See the instructions for Part IV.)

(a) Name and address	(b) Title and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-.)	(d) Contributions to employee benefit plans & deferred compensation	(e) Expense account and other allowances
SUSAN WITT, 140 JUG END ROAD, SOUTH EGREMONT, MA 01258	EXECUTIVE DIRECTOR 60.00	23,000.	8,911.	0.
GAR ALPEROVITZ, 2137 ASHMEAD PLACE NW, WASHINGTON, DC 20009	DIRECTOR 1.00	0.	0.	0.
JESSICA BRACKMAN 124 WEST 13TH ST, NEW YORK, NY 10011	VICE PRESIDENT/SECRETARY 2.00	0.	0.	0.
NEVA GOODWIN 11 LOWELL STREET, CAMBRIDGE, MA 02138	DIRECTOR 1.00	0.	0.	0.
HILDEGARDE HANNUM 10 LAUREL HEIGHTS, OLD LYME, CT 06371	DIRECTOR 3.00	0.	0.	0.
ERIC HARRIS-BRAUN, 19 BERKSHIRE RIDGE ROAD, CANAAN, NY 12029	CHAIRMAN/DIRECTOR 1.00	0.	0.	0.
DAN LEVINSON 120 POST ROAD, WESTPORT, CT 06880	DIRECTOR 2.00	0.	0.	0.
CONSTANCE PACKARD 1140 5TH AVE #5B, NEW YORK, NY 10129	DIRECTOR 1.00	0.	0.	0.
WILL RAAP, 128 INTERVALE ROAD, BURLINGTON, VT 05401	DIRECTOR 1.00	0.	0.	0.
GUS SPETH 89 JORDAN ROAD, STRAFFORD, VT 05072	DIRECTOR 1.00	0.	0.	0.
JOSEPH STANISLAW, 486 HIGHLAND STREET, SOUTH HAMILITON, MA 01982	DIRECTOR 1.00	0.	0.	0.
STEWART WALLIS, 3 JONATHAN STREET, LONDON, UNITED KINGDOM	DIRECTOR 4.00	0.	0.	0.

Part V Other Information (Note the statement requirements in the instructions for Part V.)

			Yes	No
33	Did the organization engage in any activity not previously reported to the IRS? If "Yes," attach a detailed description of each activity	33		X
34	Were any changes made to the organizing or governing documents? If "Yes," attach a conformed copy of the changes	34		X
35	If the organization had income from business activities, such as those reported on lines 2, 6a, and 7a (among others), but not reported on Form 990-T, attach a statement explaining why the organization did not report the income on Form 990-T			
a	Did the organization have unrelated business gross income of $1,000 or more or was it subject to section 6033(e) notice, reporting, and proxy tax requirements?	35a		X
b	If "Yes," has it filed a tax return on **Form 990-T** for this year?	35b	N/A	
36	Did the organization undergo a liquidation, dissolution, termination, or significant disposition of net assets during the year? If "Yes," complete applicable parts of Sch N	36		X
37a	Enter amount of political expenditures, direct or indirect, as described in the instructions ▶ 37a 0.			
b	Did the organization file **Form 1120-POL** for this year?	37b		X
38a	Did the organization borrow from, or make any loans to, any officer, director, trustee, or key employee or were any such loans made in a prior year and still outstanding at the end of the period covered by this return?	38a	X	
b	If "Yes," complete Schedule L, Part II and enter the total amount involved 38b 10,000.			
39	Section 501(c)(7) organizations Enter:			
a	Initiation fees and capital contributions included on line 9 39a N/A			
b	Gross receipts, included on line 9, for public use of club facilities 39b N/A			
40a	Section 501(c)(3) organizations Enter amount of tax imposed on the organization during the year under: section 4911 ▶ 0. ; section 4912 ▶ 0. , section 4955 ▶ 0.			
b	Section 501(c)(3) and 501(c)(4) organizations. Did the organization engage in any section 4958 excess benefit transaction during the year or is it aware that it engaged in an excess benefit transaction with a disqualified person in a prior year, and that the transaction has not been reported on any of the organization's prior Forms 990 or 990-EZ? If "Yes," complete Schedule L, Part I	40b		X
c	Section 501(c)(3) and 501(c)(4) organizations Enter amount of tax imposed on organization managers or disqualified persons during the year under sections 4912, 4955, and 4958 ▶ 0.			
d	Section 501(c)(3) and 501(c)(4) organizations Enter amount of tax on line 40c reimbursed by the organization ▶ 0.			
e	All organizations At any time during the tax year, was the organization a party to a prohibited tax shelter transaction? If "Yes," complete Form 8886-T	40e		X

41 List the states with which a copy of this return is filed. ▶ MA

42a The organization's books are in care of ▶ SUSAN WITT Telephone no ▶ 413-528-1737

Located at ▶ 140 JUG END ROAD, SOUTH EGREMONT, MA ZIP + 4 ▶ 01258

			Yes	No
b	At any time during the calendar year, did the organization have an interest in or a signature or other authority over a financial account in a foreign country (such as a bank account, securities account, or other financial account)?	42b		X
	If "Yes," enter the name of the foreign country ▶			
	See the instructions for exceptions and filing requirements for **Form TD F 90-22.1, Report of Foreign Bank and Financial Accounts.**			
c	At any time during the calendar year, did the organization maintain an office outside of the U.S.?	42c		X
	If "Yes," enter the name of the foreign country. ▶			

43 Section 4947(a)(1) nonexempt charitable trusts filing Form 990-EZ in lieu of **Form 1041** - Check here ▶ ☐

and enter the amount of tax-exempt interest received or accrued during the tax year ▶ 43 N/A

			Yes	No
44	Did the organization maintain any donor advised funds? If "Yes," Form 990 must be completed instead of Form 990-EZ	44		X
45	Is any related organization a controlled entity of the organization within the meaning of section 512(b)(13)? If "Yes," Form 990 must be completed instead of Form 990-EZ	45		X

Part VI **Section 501(c)(3) organizations and section 4947(a)(1) nonexempt charitable trusts only.** All section 501(c)(3) organizations and section 4947(a)(1) nonexempt charitable trusts must answer questions 46-49b and complete the tables for lines 50 and 51.

		Yes	No
46	Did the organization engage in direct or indirect political campaign activities on behalf of or in opposition to candidates for public office? If "Yes," complete Schedule C, Part I		X
47	Did the organization engage in lobbying activities? If "Yes," complete Schedule C, Part II		X
48	Is the organization a school as described in section 170(b)(1)(A)(ii)? If "Yes," complete Schedule E		X
49a	Did the organization make any transfers to an exempt non-charitable related organization?		X
b	If "Yes," was the related organization a section 527 organization?		

50 Complete this table for the organization's five highest compensated employees (other than officers, directors, trustees and key employees) who each received more than $100,000 of compensation from the organization If there is none, enter "None."

(a) Name and address of each employee paid more than $100,000	(b) Title and average hours per week devoted to position	(c) Compensation	(d) Contributions to employee benefit plans & deferred compensation	(e) Expense account and other allowances
NONE				

f Total number of other employees paid over $100,000 ▶

51 Complete this table for the organization's five highest compensated independent contractors who each received more than $100,000 of compensation from the organization If there is none, enter "None."

NONE

(a) Name and address of each independent contractor paid more than $100,000	(b) Type of service	(c) Compensation

d Total number of other independent contractors each receiving over $100,000 ▶

Sign Here

Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete Declaration of preparer (other than officer) is based on all information of which preparer has any knowledge

▶ Signature of officer Date 12/17/10

▶ SUSAN WITT, EXECUTIVE DIRECTOR
Type or print name and title

Paid Preparer's Use Only

Preparer's signature ▶	Date 02/17/10	Check if self-employed ▶ ☐	Preparer's identifying number (See instr.)
Firm's name (or yours if self-employed), address, and ZIP + 4 ▶ ADELSON MOYNIHAN KOWALCZYK PC 100 NORTH ST PITTSFIELD, MA 01201			EIN ▶ Phone no 413-443-6408

May the IRS discuss this return with the preparer shown above? See instructions ▶ X Yes ☐ No

SCHEDULE A (Form 990 or 990-EZ)

Department of the Treasury
Internal Revenue Service

Public Charity Status and Public Support

Complete if the organization is a section 501(c)(3) organization or a section 4947(a)(1) nonexempt charitable trust.

▶ **Attach to Form 990 or Form 990-EZ.** ▶ **See separate instructions.**

OMB No 1545-0047

2009

Open to Public Inspection

Name of the organization	Employer identification number
E.F. SCHUMACHER SOCIETY, INC.	03-0278626

Part I Reason for Public Charity Status (All organizations must complete this part.) See instructions.

The organization is not a private foundation because it is: (For lines 1 through 11, check only one box.)

1 ☐ A church, convention of churches, or association of churches described in **section 170(b)(1)(A)(i).**

2 ☐ A school described in **section 170(b)(1)(A)(ii).** (Attach Schedule E.)

3 ☐ A hospital or a cooperative hospital service organization described in **section 170(b)(1)(A)(iii).**

4 ☐ A medical research organization operated in conjunction with a hospital described in **section 170(b)(1)(A)(iii).** Enter the hospital's name, city, and state: _____

5 ☐ An organization operated for the benefit of a college or university owned or operated by a governmental unit described in **section 170(b)(1)(A)(iv).** (Complete Part II.)

6 ☐ A federal, state, or local government or governmental unit described in **section 170(b)(1)(A)(v).**

7 ☐ An organization that normally receives a substantial part of its support from a governmental unit or from the general public described in **section 170(b)(1)(A)(vi).** (Complete Part II.)

8 ☐ A community trust described in **section 170(b)(1)(A)(vi).** (Complete Part II.)

9 ☒ An organization that normally receives: (1) more than 33 1/3% of its support from contributions, membership fees, and gross receipts from activities related to its exempt functions - subject to certain exceptions, and (2) no more than 33 1/3% of its support from gross investment income and unrelated business taxable income (less section 511 tax) from businesses acquired by the organization after June 30, 1975. See **section 509(a)(2).** (Complete Part III.)

10 ☐ An organization organized and operated exclusively to test for public safety. See **section 509(a)(4).**

11 ☐ An organization organized and operated exclusively for the benefit of, to perform the functions of, or to carry out the purposes of one or more publicly supported organizations described in section 509(a)(1) or section 509(a)(2). See **section 509(a)(3).** Check the box that describes the type of supporting organization and complete lines 11e through 11h.

a ☐ Type I b ☐ Type II c ☐ Type III - Functionally integrated d ☐ Type III - Other

e ☐ By checking this box, I certify that the organization is not controlled directly or indirectly by one or more disqualified persons other than foundation managers and other than one or more publicly supported organizations described in section 509(a)(1) or section 509(a)(2).

f If the organization received a written determination from the IRS that it is a Type I, Type II, or Type III supporting organization, check this box ☐

g Since August 17, 2006, has the organization accepted any gift or contribution from any of the following persons?

		Yes	No
(i)	A person who directly or indirectly controls, either alone or together with persons described in (ii) and (iii) below, the governing body of the supported organization?		
(ii)	A family member of a person described in (i) above?		
(iii)	A 35% controlled entity of a person described in (i) or (ii) above?		

h Provide the following information about the supported organization(s).

(i) Name of supported organization	(ii) EIN	(iii) Type of organization (described on lines 1-9 above or IRC section (see instructions))	(iv) Is the organization in col (i) listed in your governing document?		(v) Did you notify the organization in col (i) of your support?		(vi) Is the organization in col (i) organized in the U S ?		(vii) Amount of support
			Yes	No	Yes	No	Yes	No	
Total									

Part II Support Schedule for Organizations Described in Sections 170(b)(1)(A)(iv) and 170(b)(1)(A)(vi)

(Complete only if you checked the box on line 5, 7, or 8 of Part I.)

Section A. Public Support

Calendar year (or fiscal year beginning in) ▶	(a) 2005	(b) 2006	(c) 2007	(d) 2008	(e) 2009	(f) Total
1 Gifts, grants, contributions, and membership fees received. (Do not include any "unusual grants.")						
2 Tax revenues levied for the organization's benefit and either paid to or expended on its behalf						
3 The value of services or facilities furnished by a governmental unit to the organization without charge						
4 **Total.** Add lines 1 through 3						
5 The portion of total contributions by each person (other than a governmental unit or publicly supported organization) included on line 1 that exceeds 2% of the amount shown on line 11, column (f)						
6 **Public support.** Subtract line 5 from line 4						

Section B. Total Support

Calendar year (or fiscal year beginning in) ▶	(a) 2005	(b) 2006	(c) 2007	(d) 2008	(e) 2009	(f) Total
7 Amounts from line 4						
8 Gross income from interest, dividends, payments received on securities loans, rents, royalties and income from similar sources						
9 Net income from unrelated business activities, whether or not the business is regularly carried on						
10 Other income. Do not include gain or loss from the sale of capital assets (Explain in Part IV.)						
11 **Total support.** Add lines 7 through 10						

12 Gross receipts from related activities, etc. (see instructions) 12

13 **First five years.** If the Form 990 is for the organization's first, second, third, fourth, or fifth tax year as a section 501(c)(3) organization, check this box and **stop here** ▶ ☐

Section C. Computation of Public Support Percentage

14 Public support percentage for 2009 (line 6, column (f) divided by line 11, column (f)) 14 %

15 Public support percentage from 2008 Schedule A, Part II, line 14 15 %

16a **33 1/3% support test - 2009.** If the organization did not check the box on line 13, and line 14 is 33 1/3% or more, check this box and **stop here.** The organization qualifies as a publicly supported organization ▶ ☐

b **33 1/3% support test - 2008.** If the organization did not check a box on line 13 or 16a, and line 15 is 33 1/3% or more, check this box and **stop here.** The organization qualifies as a publicly supported organization ▶ ☐

17a **10% -facts-and-circumstances test - 2009.** If the organization did not check a box on line 13, 16a, or 16b, and line 14 is 10% or more, and if the organization meets the "facts-and-circumstances" test, check this box and **stop here.** Explain in Part IV how the organization meets the "facts-and-circumstances" test. The organization qualifies as a publicly supported organization ▶ ☐

b **10% -facts-and-circumstances test - 2008.** If the organization did not check a box on line 13, 16a, 16b, or 17a, and line 15 is 10% or more, and if the organization meets the "facts-and-circumstances" test, check this box and **stop here.** Explain in Part IV how the organization meets the "facts-and-circumstances" test. The organization qualifies as a publicly supported organization ▶ ☐

18 **Private foundation.** If the organization did not check a box on line 13, 16a, 16b, 17a, or 17b, check this box and see instructions ▶ ☐

Part III Support Schedule for Organizations Described in Section 509(a)(2) (Complete only if you checked the box on line 9 of Part I)

Section A. Public Support

Calendar year (or fiscal year beginning in) ▶	(a) 2005	(b) 2006	(c) 2007	(d) 2008	(e) 2009	(f) Total
1 Gifts, grants, contributions, and membership fees received. (Do not include any "unusual grants.")	169,842.	241,138.	260,472.	434,720.	254,530.	1360702.
2 Gross receipts from admissions, merchandise sold or services performed, or facilities furnished in any activity that is related to the organization's tax-exempt purpose	40,138.	38,031.	41,284.	33,883.	19,885.	173,221.
3 Gross receipts from activities that are not an unrelated trade or business under section 513						
4 Tax revenues levied for the organization's benefit and either paid to or expended on its behalf						
5 The value of services or facilities furnished by a governmental unit to the organization without charge						
6 **Total.** Add lines 1 through 5	209,980.	279,169.	301,756.	468,603.	274,415.	1533923.
7a Amounts included on lines 1, 2, and 3 received from disqualified persons	44,405.	47,870.	51,569.	71,605.	75,450.	290,899.
b Amounts included on lines 2 and 3 received from other than disqualified persons that exceed the greater of $5,000 or 1% of the amount on line 13 for the year						0.
c Add lines 7a and 7b	44,405.	47,870.	51,569.	71,605.	75,450.	290,899.
8 **Public support** (Subtract line 7c from line 6)						1243024.

Section B. Total Support

Calendar year (or fiscal year beginning in) ▶	(a) 2005	(b) 2006	(c) 2007	(d) 2008	(e) 2009	(f) Total
9 Amounts from line 6	209,980.	279,169.	301,756.	468,603.	274,415.	1533923.
10a Gross income from interest, dividends, payments received on securities loans, rents, royalties and income from similar sources	873.	1,168.	6,177.	3,895.	500.	12,613.
b Unrelated business taxable income (less section 511 taxes) from businesses acquired after June 30, 1975						
c Add lines 10a and 10b	873.	1,168.	6,177.	3,895.	500.	12,613.
11 Net income from unrelated business activities not included in line 10b, whether or not the business is regularly carried on						
12 Other income. Do not include gain or loss from the sale of capital assets (Explain in Part IV.)						
13 **Total support** (Add lines 9, 10c, 11, and 12)	210,853.	280,337.	307,933.	472,498.	274,915.	1546536.

14 **First five years.** If the Form 990 is for the organization's first, second, third, fourth, or fifth tax year as a section 501(c)(3) organization, check this box and **stop here** ▶ ☐

Section C. Computation of Public Support Percentage

15 Public support percentage for 2009 (line 8, column (f) divided by line 13, column (f))	15	80.37 %
16 Public support percentage from 2008 Schedule A, Part III, line 15	16	83.73 %

Section D. Computation of Investment Income Percentage

17 Investment income percentage for **2009** (line 10c, column (f) divided by line 13, column (f))	17	.82 %
18 Investment income percentage from **2008** Schedule A, Part III, line 17	18	.76 %

19a **33 1/3% support tests - 2009.** If the organization did not check the box on line 14, and line 15 is more than 33 1/3%, and line 17 is not more than 33 1/3%, check this box and **stop here.** The organization qualifies as a publicly supported organization ▶ ☒

b **33 1/3% support tests - 2008.** If the organization did not check a box on line 14 or line 19a, and line 16 is more than 33 1/3%, and line 18 is not more than 33 1/3%, check this box and **stop here.** The organization qualifies as a publicly supported organization ▶ ☐

20 **Private foundation.** If the organization did not check a box on line 14, 19a, or 19b, check this box and see instructions ▶ ☐

FORM 990-EZ OTHER EXPENSES STATEMENT 1

DESCRIPTION	AMOUNT
ADVERTISING	3,838.
BANK/CREDIT CARD FEES	890.
CONFERENCE/EVENT EXPENSE	490.
	2,878.
HONORARIUMS	1,500.
INSURANCE ORGANIZATIONAL	2,441.
LECTURE EXPENSES	1,563.
MEALS AND ENTERTAINMENT	1,135.
MEMBERSHIPS/DONATIONS	370.
MISCELLANEOUS	486.
PROGRAM FACILITIES/FOOD/LODGING	11,544.
SUPPLIES- OFFICE	3,423.
TELEPHONE & INTERNET	7,881.
TRAVEL	11,490.
VOLUNTEER EXPENSES	1,672.
TOTAL TO FORM 990-EZ, LINE 16	51,601.

FORM 990-EZ OTHER ASSETS STATEMENT 2

DESCRIPTION	BEG. OF YEAR	END OF YEAR
INVENTORIES	29,470.	24,798.
OTHER DEPRECIABLE ASSETS	21,545.	19,528.
TOTAL TO FORM 990-EZ, LINE 24	51,015.	44,326.

FORM 990-EZ GAIN (LOSS) FROM PUBLICLY TRADED SECURITIES STATEMENT 3

DESCRIPTION	GROSS SALES PRICE	COST OR OTHER BASIS	EXPENSE OF SALE	NET GAIN OR (LOSS)
MEDTRONIC STOCK	1,569.	1,542.	0.	27.
TO FORM 990-EZ, LINE 5	1,569.	1,542.	0.	27.

SCHEDULE L
(Form 990 or 990-EZ)

Department of the Treasury
Internal Revenue Service

Transactions With Interested Persons

▶ Complete if the organization answered "Yes" on Form 990, Part IV, line 25a, 25b, 26, 27, 28a, 28b, or 28c, or Form 990-EZ, Part V, line 38a or 40b.

▶ Attach to Form 990 or Form 990-EZ. ▶ See separate instructions.

OMB No 1545-0047

2009

Open To Public Inspection

Name of the organization

E.F. SCHUMACHER SOCIETY, INC.

Employer identification number

03-0278626

Part I Excess Benefit Transactions (section 501(c)(3) and section 501(c)(4) organizations only).

Complete if the organization answered "Yes" on Form 990, Part IV, line 25a or 25b, or Form 990-EZ, Part V, line 40b.

1 (a) Name of disqualified person	(b) Description of transaction	(c) Corrected? Yes	(c) Corrected? No

2 Enter the amount of tax imposed on the organization managers or disqualified persons during the year under section 4958 ▶ $

3 Enter the amount of tax, if any, on line 2, above, reimbursed by the organization ▶ $

Part II Loans to and/or From Interested Persons.

Complete if the organization answered "Yes" on Form 990, Part IV, line 26, or Form 990-EZ, Part V, line 38a.

(a) Name of interested person and purpose	(b) Loan to or from the organization? To	(b) Loan to or from the organization? From	(c) Original principal amount	(d) Balance due	(e) In default? Yes	(e) In default? No	(f) Approved by board or committee? Yes	(f) Approved by board or committee? No	(g) Written agreement? Yes	(g) Written agreement? No
MSR ADVISORS, INC	X		10,000.	10,000.		X	X		X	
Total			▶ $	10,000.						

Part III Grants or Assistance Benefiting Interested Persons.

Complete if the organization answered "Yes" on Form 990, Part IV, line 27.

(a) Name of interested person	(b) Relationship between interested person and the organization	(c) Amount and type of assistance

Part IV Business Transactions Involving Interested Persons.

Complete if the organization answered "Yes" on Form 990, Part IV, line 28a, 28b, or 28c.

(a) Name of interested person	(b) Relationship between interested person and the organization	(c) Amount of transaction	(d) Description of transaction	(e) Sharing of organization's revenues? Yes	(e) Sharing of organization's revenues? No

LHA **For Privacy Act and Paperwork Reduction Act Notice, see the Instructions for Form 990 or 990-EZ.**

Schedule L (Form 990 or 990-EZ) 2009

SEE GENERAL EXPLANATION FOR SCHEDULE L CONTINUATIONS

932131 02-01-10

FORM 990-EZ GAIN (LOSS) FROM SALE OF OTHER ASSETS STATEMENT 4

DESCRIPTION	DATE ACQUIRED	DATE SOLD	METHOD ACQUIRED
SCRAPPED EQUIPMENT	01/13/00	12/31/09	PURCHASED

NAME OF BUYER	GROSS SALES PRICE	COST OR OTHER BASIS	EXPENSE OF SALE	DEPREC	NET GAIN OR (LOSS)
	0.	885.	0.	885.	0.

DESCRIPTION	DATE ACQUIRED	DATE SOLD	METHOD ACQUIRED
SCRAPPED EQUIPMENT	08/31/02	09/31/09	PURCHASED

NAME OF BUYER	GROSS SALES PRICE	COST OR OTHER BASIS	EXPENSE OF SALE	DEPREC	NET GAIN OR (LOSS)
	0.	1,290.	0.	1,290.	0.

DESCRIPTION	DATE ACQUIRED	DATE SOLD	METHOD ACQUIRED
SCRAPPED EQUIPMENT	06/22/04	12/31/09	PURCHASED

NAME OF BUYER	GROSS SALES PRICE	COST OR OTHER BASIS	EXPENSE OF SALE	DEPREC	NET GAIN OR (LOSS)
	0.	1,017.	0.	1,017.	0.

DESCRIPTION	DATE ACQUIRED	DATE SOLD	METHOD ACQUIRED
SCRAPPED EQUIPMENT	04/05/06	12/31/09	DONATED

NAME OF BUYER	GROSS SALES PRICE	COST OR OTHER BASIS	EXPENSE OF SALE	DEPREC	NET GAIN OR (LOSS)
	0.	1,600.	0.	960.	-640.

DESCRIPTION	DATE ACQUIRED	DATE SOLD	METHOD ACQUIRED
SCRAPPED EQUIPMENT	05/22/06	12/31/09	PURCHASED

NAME OF BUYER	GROSS SALES PRICE	COST OR OTHER BASIS	EXPENSE OF SALE	DEPREC	NET GAIN OR (LOSS)
	0.	314.	0.	134.	-180.
TO FORM 990-EZ, LINE 5		5,106.	0.	4,286.	-820.

FORM 990-EZ OCCUPANCY, RENT, UTILITIES AND MAINTENANCE STATEMENT 5

DESCRIPTION	AMOUNT
DEPRECIATION	26,301.
OTHER EXPENSES	43,793.
TOTAL TO FORM 990-EZ, LINE 14	70,094.

FORM 990-EZ — INCOME AND COST OF GOODS SOLD INCLUDED ON PART I, LINE 7A — STATEMENT 6

INCOME		
1. GROSS RECEIPTS	3,003	
2. RETURNS AND ALLOWANCES		
3. LINE 1 LESS LINE 2		3,003
4. COST OF GOODS SOLD (LINE 13)	6,714	
5. GROSS PROFIT (LINE 3 LESS LINE 4)		-3,711
COST OF GOODS SOLD		
6. INVENTORY AT BEGINNING OF YEAR	29,601	
7. MERCHANDISE PURCHASED	2,042	
8. COST OF LABOR		
9. MATERIALS AND SUPPLIES		
10. OTHER COSTS		
11. ADD LINES 6 THROUGH 10		31,643
12. INVENTORY AT END OF YEAR	24,929	
13. COST OF GOODS SOLD (LINE 11 LESS LINE 12)		6,714

FORM 990-EZ INFORMATION REGARDING TRANSFERS ASSOCIATED WITH PERSONAL BENEFIT CONTRACTS STATEMENT 7

A) DID THE ORGANIZATION, DURING THE YEAR, RECEIVE ANY FUNDS, DIRECTLY OR INDIRECTLY, TO PAY PREMIUMS ON A PERSONAL BENEFIT CONTRACT? . . . . . [ ] YES [X] NO

B) DID THE ORGANIZATION, DURING THE YEAR, PAY PREMIUMS, DIRECTLY OR INDIRECTLY, ON A PERSONAL BENEFIT CONTRACT? . . [ ] YES [X] NO

TO EDUCATE IN THE USE AND PRESERVATION OF THE NATURAL ENVIRONMENT, THE IMPORTANCE OF APPROPRIATE SCALE IN TECHNOLOGY AND HUMAN ORGANIZATIONS, AND THE VALUE OF SELF-SUFFICIENT COMMUNITIES.

General Explanation Attachment

Name of the organization	Employer identification number
E.F. SCHUMACHER SOCIETY, INC.	03-0278626

SCHEDULE L, PART II, LOANS TO AND FROM INTERESTED PERSONS:

(A) NAME OF PERSON: MSR ADVISORS, INC.

(A) PURPOSE OF LOAN: SHORT TERM OPERATING LOAN

E. F. Schumacher Society 030278626
Attachment to 2009 990 Form

Part III Statement of Program Service Accomplishments

1. The E. F. Schumacher Society continued to make improvements to its Library building including a new roof, improved insulation, and a doubling of supporting beams. New donations of materials were also received. Interns under the direction of staff completed cataloguing E. F. Schumacher's archives and personal papers. Researchers accessed the Library's computer index of over 15,000 books and the archives over the Internet. Students from universities throughout the Northeast have used the Library for research, as have other visitors to the building. In addition to the computer catalogue, staff maintain a physical card catalogue for the collection

2. The Schumacher Society's web site was expanded to contain new texts of the collected E. F. Schumacher Society lectures on subjects relating to the environment, sustainable communities, and citizen-based approaches to solving local problems. The Society's eNewsletters were posted in blog form as well as on the website. The MANAS journal related website was used as study material for groups in their homes. The BerkShares website continues to be updated to include extensive media coverage of the BerkShares model economic development program and related educational materials. Together the three educational websites of the E. F. Schumacher Society received a total of seven million hits in 2009 according to statistics provided by our web host.

3. The Twenty-Nineth Annual Schumacher Lectures were held in Stockbridge, Massachusetts in cooperation with regional organizations. The 300-person audience heard addresses on environmental, social and economic issues by Bill McKibben, Benjamin Barber, and Aliza Gravitz. Audio and printed transcript of the talks were placed on the Society's website.

4. The Society's publication program continued with editing and printing of the Schumacher Lectures made available through the Society's Publication Service and over the Internet. Pamphlets which had gone out of print were reprinted during the year. The Lectures circulated broadly on the internet and were used as texts in college classrooms.

5. The Society continued to provide education services to other regions about a "Small is Beautiful" approach to economic and cultural renewal, traveling to conferences around the country, speaking, and providing information via phone and publications.

6. Executive Director, Susan Witt, was invited and completed an essay for an upcoming book on Jane Jacobs, describing her economic concepts.

7. The E. F. Schumacher Society provided research assistance, development, and administrative oversight for BerkShares, a local currency designed to educate citizens about the importance of vibrant, self-sufficient, regional economies. The Society developed literature about the program, strategized on future development, hosted international media wishing to cover the story, and engaged with representatives of other communities wishing to develop similar programs in their own areas. The program continues to receive international media attention, educating about the import role of strong local economies in building sustainable communities.

8. The international media attention to the Society's programs has led staff to explore close collaboration with other organizations working in the field of community economics to provide a broader context for the Society's programs and maximize media interest in the subject. As part of this initiative, the Society expanded its board to include economists and those applying new economic thinking.

9. The acquisition and restoration of Guilder House in 2008 enabled the Society to engage three interns during the year who worked on the Library, BerkShares, web development, new collaborations, and new media outreach.